

YEALINK PHONE TUTORIAL – BASICS

This guide accompanies the recorded video and is not suitable to be followed without the additional context provided within the video.

PHONE BUTTONS/LAYOUT

- **Ext# & Name** – Displayed in top-left corner of Screen, or in the middle of the screen for older/basic Models
- **Programmable Buttons** – Includes Park Keys, Speed Dials, BLFs (Extension Status) & Service Flags (Modes)
- **History** – Shows Incoming & Outgoing call history for the Extension. Use arrow keys to navigate and Ok to select/dial.
- **Directory** – Lists other Extensions and saved Phone#'s for quick dialling. Names for saved numbers will also display on screen for incoming calls.
- **DND** – Do Not Disturb ensure the Extension will not ring when activated.
- **Notification LED** – Flashed for Incoming Calls, Update/Sync & Voicemail Notifications
- **Volume Control** – Adjusts the Ringer volume when NOT on a call. Adjust the call/speaker volume DURING a call.
- **Redial** – Shows Outgoing call history. Use arrow keys to navigate and Ok to select/dial.
- **Headset** – Activates and allows use of connected Headset.
- **Messages** – Accesses Voicemail for the Extension.

BASIC FUNCTIONS

DIALLING OUT

On our systems, choosing a Line or dialling a prefix to get an outside line is no longer relevant. Simply dial the number directly, whether that's an internal number/extension, or an external number.

Remember, you can press # (SEND) to complete a number and dial.

HOLD VS PARK

Hold places the call on hold only for your Extension and cannot be picked up from another without first transferring.

For many offices, parking calls is the preferred choice. By parking a call, those parks are typically accessible by other Office Extensions and easily retrievable via the Park key.

TRANSFER

In small offices, it's less likely that calls are transferred and instead, simply parked and handed over in that manner.

For larger offices or where transferring to external Numbers, the transfer process may be used.

1. During the call, press Transfer
2. Dial the new Number/Extension (this includes using the Directory)
 - a. As soon as you hear the Ringer, you can hang up to complete the Transfer. This is known as a **Blind Transfer**.
 - b. Wait for the other party to answer to discuss the transfer, then hang up to complete the Transfer. This is known as an **Assisted/Attended Transfer**.

ADVANCED FUNCTIONS

This section briefly describes more advanced functionality. As most options must be programmed on the PBX, they're not discussed or demonstrated in the Video. You may use this section to understand what's possible and consider your own call flow & desired functionality.

AUTO-ATTENDANT (IVR)

IVRs offer interactive menu options for callers. *E.g. Press 1 for Sales, 2 for Accounts, etc.*

Additionally, IVRs may be used for callers to connect with known Extensions directly, without having to wait for Reception/Admin to first answer and direct the call.

CALL QUEUES

Call Queues are more advanced than basic Ring/Hunt Groups in that Callers may be kept in queue until answered and can optionally listen to various pre-recorded greetings/messages. Call Queues offering additional functionality around what to do if a caller has remained in queue for a number of seconds/minutes and more.

SOFTPHONE (MOBILE & WEB)

Using either the Mobile App, or Website, a Softphone is simply an Extension of your Office Phone System, without the physical Phone attached. You can use your Mobile or Computer to place/receive calls.

****Note that calling out from the Softphone on your Mobile will appear to call from your usual Office/Landline number and NOT your Mobile# so is perfectly safe to use on a personal mobile without risk of exposing your personal Mobile#.**

TWINNING

Depending on your plan, you can have a secondary Phone# associated with your Extension, call Twinning.

This means that when your Extension is called in the office, your Mobile# can ring at the same time in order to answer the call. Great for those continually in and out of the office.

STAR CODES / DIVERTING EXTENSIONS

Refer to the specific Star Codes document listed alongside this one. Star codes access various features including the ability to divert or undivert an Extension and more.

RECORDED GREETINGS

Depending on your call flow, greetings may be recorded at each stage. Initial/Intercept, On Hold/Queue, Missed Calls, Night & Holidays.

SERVICE FLAGS

Used to control call flow in pre-programmed ways. *E.g. An Away/Night flag might force calls immediately to the Night Greeting/Voicemail. Or a Diversion flag might allow all Incoming Calls to a Ring Group to divert to another Number/Mobile.*

Services Flags may be automated using Day/Time controls or left to switch on/off manually.

BLACKLIST NUMBERS

Nuisance/abusive callers may be saved into the Directory as a Blacklisted number meaning their calls are immediately blocked.